Chapter 18: The Organization and Facility List

SEER*DMS maintains information about organizations and facilities that collaborate with the cancer registry. The organization and facility list includes the registry itself, organizations that provide data to the registry, and those receiving data or other information from the registry. Each organization is uniquely identified by a Facility ID. The organization list is referenced throughout SEER*DMS to set facility information in data fields, track sources of data, manage abstracting assignments, and provide a mechanism for follow-back.

You can use the Organization and Facility Manager to view or manage the organization list. The Organization/Facility Lookup, available throughout the system, provides a convenient mechanism for setting data fields. If you have the appropriate permission settings, you can add organizations using either the manager or the lookup.

In this chapter, you'll learn about

- Accessing the Organization and Facility List
- Searching the Organization and Facility List
- Using the Organization/Facility Lookup
- Adding an Organization
- Specifying an Organization's Contacts
- Updating an Organization
- Deactivating an Organization
- Deleting an Organization

Accessing the Organization and Facility List

Requires system permission: *facility_view*

To view a list of the organizations and facilities defined in SEER*DMS, select **View > Organizations**. All active organizations and facilities will be displayed. You may use the filter to find a specific organization or to view a list of organizations meeting your search criteria. The filter is described in the *Searching the Organization and Facility List* section of this chapter.

The following data columns are shown.

- **T** – Type of organization (see the list of icons provided below).
- **ID** – The unique "Facility ID" assigned when the organization or facility was added to SEER*DMS. "FAC" is used as a prefix for organization and facility IDs.
- **Name** – The name of the organization or facility.
- **Address** – The street, city, state, and postal code designated for the organization.
- **Phone** – The phone number and extension provided for the organization.
- **Area** – Displays I for in area and O for out of area. The definitions of "in area" and "out of area" are determined by registry policy.
- **S** – The status field indicating whether the organization is active or inactive (see the list of icons provided below).

The **T** column displays each organization's Type:

C Clinic
D Doctor Office
H Hospital

Lab
Nursing Home
Organization
Radiation Therapy Unit
Treatment Center

No icons are currently used for:

Hospice
Medical Examiner's Office
Other Facility

The **S** column displays the Status of each organization:

Active
Inactive (inactive organizations are displayed if **Hide Inactive** is unchecked)

Typically, the list will contain too many results to fit on the screen all at once and will be broken into several pages. Use the Page Selection links to view the rest of the list, or use the Filter controls to search or limit the list.

Searching the Organization and Facility List

Requires system permission: *facility_view*

To search for a specific organization or limit the list:

1. Select **View > Organizations**. The active organizations and facilities will be listed in alphabetical order. Hide Inactive will be checked by default when you first go to the Organization and Facility Manager.

2. To sort the list by a field other than name, click one of the underlined column headers (you cannot sort by address). To reverse the sort order, click the same header again.

   Tip: In SEER*DMS, the sort order of a table is indicated by the column headers. A unique color is used for the sort field's column header. An up arrow will be displayed next to the column name if the table is sorted in ascending order; a down arrow will be displayed if the table is sorted in descending order.

3. To search for an organization by name or ID, enter search text into the **Name/ID** filter (partial names and IDs can be used in the search).

4. To only search the list of active organizations, check **Hide Inactive**. Uncheck this box to include the inactive organizations in your search.

5. Check **Hide Out of Area** to search for organizations that have been classified as "in area"; uncheck this box to search for organizations regardless of their area classification.

6. If you are searching for organizations of a specific type(s), select one or more items in the **Type(s)** filter.

7. Click **Apply**.

8. To do another search, you may return the filter to its default settings by clicking **Reset**.

9. To send a message to the organization's email address, click the **email** link in the **Action** column (this link will only be available if an email address is defined for the organization).

Using the Organization/Facility Lookup

Organizations are typically added or modified by using the Organization and Facility Manager (accessed from the **View > Organizations** menu). On pages throughout SEER*DMS, the Organization/Facility Lookup is used to select an organization. If you have the appropriate permissions, you can add or modify an organization entry while using the lookup.

If your account has the *facility_add* permission, the Organization/Facility popup window will include an **Add** button. Users with the *facility_edit* permission can click the **edit** link adjacent to an existing organization to modify its information. The popup window is not large enough to display all fields, therefore only a limited number of fields may be entered or modified by using the lookup.

The following information cannot be entered or modified while using the Organization/Facility lookup: Primary Contact, Alternate Contact, Web Addreses, Latititude, Longitude, logistical information related to visiting the organization, Record Type Expected, Affiliated Organizations, Casefinding Contacts, and Data Exchange Agreement information. Select **View > Organizations** to enter or modify these fields.

Adding an Organization

Requires system permission: facility_add

*To add a facility or organization in SEER*DMS:*

1. Select **View > Organizations.** Or if you are visually editing and need to enter an organization that is not currently a SEER*DMS organization, click the lookup icon next to the data field to open the Organization/Facility popup (a limited number of fields can be added using the popup as described in *Using the Organization/Facility Lookup*).
2. Click **Add** (this button will only be shown if you have the *facility_add* permission).
3. Select the appropriate **Facility Type** and enter **Facility Name**. These fields are required.
4. Enter the Facility Identification Number in the **FIN** field, if known.
5. Enter the National Provider Identifier in the **NPI** field, if known.
6. When a person in the Contact List is designated as an affiliate of an organization, that person can be specified as the primary, alternate, or casefinding contact for the organization. By definition, there are no contacts in the Contact List affiliated with a newly created organization. Therefore, you cannot specify primary, alternate, or casefinding contacts at this time. Once the organization is saved, you may set a contact's affiliation to this organization (see *Chapter 19: The Contact List*). You will then be able to set the organization's contact fields by following the instructions below in *Specifying an Organization's Contacts*. The organization's contact fields are not used by SEER*DMS, but are available here for your convenience when contacting the organization.
7. Enter information related to email address, phone, and location in the appropriate fields.
8. If you wish to track cost and logistical information related to visiting the organization, enter the **Cost to Visit ($)**, **Mileage from Registry**, **Season to Visit**.
9. If you expect to receive data in specific file formats and wish to track this information, specify the information in the **Rec. Type Expected** field.
10. If you wish to track organizational affiliations, add organizations to the **Affiliated Org/Fac** list.

11. Check **Out of Area**, if appropriate. This field may be used to identify organizations that do not serve the catchment area or to track other boundaries of interest to the registry.
12. Check **Under Contract** if the organization is a contract facility.
13. Verify that the **Active** box is checked (default setting).
14. If you would like to track information related to a data exchange agreement with this organization, click **Add DEA**.
    a. Enter the date that the data exchange agreement went into effect in **Start Date**.
    b. Enter the **End Date** for the data exchange agreement, if applicable.
    c. Use the **Transfer Format**, **Transfer Schedule**, **Incoming Info**, **Outgoing Info**, and **Comments** to track information according to your registry's guidelines.
15. Click **Save**.

Specifying an Organization's Contacts

Requires system permission: *facility_edit*

Contacts defined in SEER*DMS as affiliates of the organization can be added as Primary, Alternate, or Casefinding contacts. To review the Contact List or to add an individual to the list, see *Chapter 19: The Contact List*.

To specify primary, alternate, and/or casefinding contacts for an organization:

1. Select **View > Organizations**.
2. Use the **Filter** to search for the organization:
    a. To search by name or ID, enter a full or partial search string into the **Name/ID** filter.
    b. To only search the list of active organizations, check **Hide Inactive**. Uncheck this box to include the inactive organizations in your search. (If you are adding contacts to an organization that is designated as "inactive", you should correct the status setting.)
    c. If you are unsure whether the organization has been designated as "in area" or "out of area", uncheck **Hide Out of Area** to search for an organization regardless of its area.
    d. If you know the organization's type, you may select it in the **Type(s**) filter.
    e. Click **Apply**.
3. Click the **ID** of the organization to be updated.
4. To specify the **Primary Contact** or **Alternate Contact**, click the corresponding Lookup link. Use the filter to find and select the contact.
5. To add a new casefinding contact:
    a. Click the **Add Contact** link adjacent to the **Casefinding Contacts** heading. Use the filter to find and select a representative who will perform casefinding activities at this organization. You may enter the **Department** and **Location** within the organization where this person will be casefinding, if appropriate.
    b. Click **OK**.

6. To remove a casefinding contact, click the **remove** link adjacent to the contact.
7. Click **Save**.

Updating an Organization

Requires system permission: facility_edit

The following instructions describe methods for modifying all data items related to an organization or facility. To designate an individual in one of the organization's contact fields, there must be an entry for the person in the Contacts List which includes this organization in the Organization and Facility Affiliation field. Select View > Contacts to review add a person to the Contact list or verify the list of organizations specified for a contact (see *Chapter 19: The Contact List*).

To update any fields related to an organization:

1. Select **View > Organizations**.
2. Use the **Filter** to search for the organization:
   a. If you know the organization's name or ID, enter full or partial search strings into the **Name/ID** filter.
   b. To only search the list of active organizations, check **Hide Inactive**. Uncheck this box to include the inactive organizations in your search. (If you are adding contacts to an organization that is designated as "inactive", you should correct the status setting.)
   c. If you are unsure whether the organization has been designated as "in area" or "out of area", uncheck **Hide Out of Area** to search for an organization regardless of its area.
   d. If you know the organization's type, you may select it in **Type(s**) list box.
   e. Click **Apply**.
3. Click the **ID** of the organization to be updated.
4. Update the values in any data fields as necessary.
5. To specify the **Primary Contact** or **Alternate Contact**, click the corresponding **Lookup** link. Use the filter to find and select the contact.
6. To add a new casefinding contact:
   a. Click the **Add Contact** link adjacent to the **Casefinding Contacts** heading. Use the filter to find and select a representative who will perform casefinding activities at this organization. You may enter the **Department** and **Location** within the organization where this person will be casefinding, if appropriate.
   b. Click **OK**.
7. To remove a casefinding contact, click the **remove** link adjacent to the contact.
8. To define a data exchange agreement with this organization or facility, click **Add DEA**.
9. To enter or update the information about the data exchange agreement:
   a. Enter the date that the data exchange agreement went into effect in **Start Date**.
   b. Enter the **End Date** for the data exchange agreement.

c. Use the **Transfer Format**, **Transfer Schedule**, **Incoming Info**, **Outgoing Info**, and **Comments** to track information according to your registry's guidelines.

10. Click **Save**.

Deactivating an Organization

Requires system permission: *facility_edit*

You may deactivate facilities or organizations that are no longer affiliated with your registry or reactivate those that were inadvertently deactivated. Organizations and facilities are permanently maintained in SEER*DMS for tracking purposes.

To deactivate an organization or facility:

1. Select **View > Organizations**.
2. Use the **Filter** to search for the organization:
   a. If you know the organization's name or ID, enter full or partial search strings into the **Name/ID** filter.
   b. If you are unsure whether the organization has been designated as "in area" or "out of area", uncheck **Hide Out of Area** to search for an organization regardless of its area.
   c. If you know the organization's type, you may select it in **Type(s**) list box.
   d. Click **Apply**.
3. Click on the **ID** of the organization.
4. Uncheck the **Active** box. At any time, you may change the status of the organization to active by checking this box.
5. Click **Save**.

Deleting an Organization

Requires system permission: *facility_delete*

Organizations cannot be deleted in the current version of SEER*DMS. The *facility_delete* system permission was created to allow for this functionality in future versions.